

Message Text

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ACTION IO-06

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SUBJECT: ECE STEEL COMMITTEE, FORTY-SECOND SESSION

SUMMARY. PLENARY SESSION OF ECE STEEL COMMITTEE MET
OCT 30-NOV 1 IN GENEVA. PUBLICATION OF STEEL MARKET 1973
REPORT APPROVED AND PROGRESS ON THREE MAJOR STUDY PROGRAMS
REVIEWED. END SUMMARY.

1. ECE STEEL COMMITTEE HELD 42ND SESSION, OCT 30- NOV 1,
PRECEDED BY MEETING GROUP OF EXPERTS ON LONG TERM
PROSPECTS FOR STEEL PRODUCTION, CONSUMPTION AND TRADE
HELD OCT 28-29. US REPRESENTATIVE PARTICIPATED BOTH
MEETINGS. COMMITTEE ELECTED AS CHAIRMAN M. DE MIJOLLA
(FRANCE) AND MR. SOBCZYK (POLAND) VICE CHAIRMAN.

2. COMMITTEE ADOPTED AND ISSUED SECRETARIAT COMPILED
REPORT: THE STEEL MARKET 1973, WHICH SUMMARIZES YEAR'S
IMPORTANT INTERNATIONAL DEVELOPMENTS IN STEEL AS WELL
AS STATEMENTS PROVIDED BY TWENTY-FOUR MEMBER
GOVERNMENTS ON DEVELOPMENTS IN NATIONAL STEEL INDUSTRIES
DURING 1973. REPORT PROVIDES EXCELLENT INFORMATION ON
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PRODUCTION; APPARENT CONSUMPTION; STEEL USED IN MOTOR

VEHICLE, SHIPBUILDING, AND CONSTRUCTION INDUSTRIES;
TRADE; PRICES; AND INVESTMENT RELATING TO STEEL AND
IRON ORE.

3. DELEGATIONS GAVE PRELIMINARY STATEMENTS DESCRIBING
IMPORTANT STEEL INDUSTRY DEVELOPMENTS IN THEIR COUNTRIES
FOR 1974 AND OUTLOOK FOR 1975. PRESENTATIONS FORM BASIS
FOR PUBLICATION STEEL MARKET REPORT FOR 1974. AMONG
WESTERN COUNTRIES, WITH EXCEPTIONS SWEDEN AND AUSTRIA,
COUNTRY OUTLOOK STATEMENTS REFLECTED SLOW-DOWN IN
ECONOMIES AND TOOK MODERATELY PESSIMISTIC VIEW OF 1975.
STEEL DEMAND FOR CONSTRUCTION, MOTOR VEHICLE AND CONSUMER
DURABLES INDUSTRIES WAS REPORTED DOWN SUBSTANTIALLY IN
ALMOST ALL COUNTRIES. SHIPBUILDING DEMAND FOR STEEL
CONTINUES RELATIVELY HIGH. NO DELEGATIONS WILLING
PROGNOSTICATE TIMING OF A GENERAL UPTURN IN OVERALL STEEL
DEMAND.

4. COMMITTEE HEARD REPORTS ON PROGRESS ITS THREE MAJOR
STUDY PROJECTS: (A) LONG-TERM PROSPECTS FOR STEEL
PRODUCTION, CONSUMPTION, AND TRADE, (B) CHANGING PATTERN
OF ENERGY USE IN IRON AND STEEL INDUSTRY (C) STRUCTURAL
CHANGES IN IRON AND STEEL INDUSTRY. IN REGARD
LONG TERM PROSPECTS STUDY, US EXPRESSED CONCERN AT
TOO HIGH PRELIMINARY ESTIMATES FOR US STEEL CONSUMPTION
IN 1980'S AND QUESTIONED COMMITTEE SECRETARIAT'S USE
OF DATED FORECASTING MODEL. SEVERAL OTHER COUNTRIES
EXPRESSED SIMILAR MISGIVINGS. US SOUGHT SECRETARIAT
CHANGE IN BASIS OF COMPUTATION OF CONSUMPTION PROJECTIONS.
CONSENSUS WAS THAT, WHILE ECONOMIC MODEL CONTAINED
SERIOUS DRAWBACKS, NOW TOO LATE TO DISCARD ENTIRELY.
SECRETARIAT INSTRUCTED, HOWEVER, TO REVISE PROJECTIONS
IN LIGHT OF NEW DATA ON WORLD GDP GROWTH SECURED FROM
ECE ECONOMIC ADVISORS STUDY AS WELL AS ANY NEW INFORMATION
AVAILABLE ON EFFECTS OF INCREASED ENERGY COSTS. MEMBER
DELEGATIONS INVITED TO SUBMIT THEIR OWN REVISED ESTIMATES
FOR STEEL CONSUMPTION WHICH WOULD BE PUBLISHED ALONGSIDE
REVISED SECRETARIAT FINDINGS. COUNTRIES ALSO REQUESTED
SUBMIT NARRATIVE SUPPORTING ANALYSIS POINTING OUT
SIGNIFICANT TRENDS AND FACTORS AFFECTING VARIATIONS IN
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ESTIMATES. FINAL DRAFT OF LONG TERM TRENDS REPORT SLATED
FOR DISCUSSION IN JUNE 1975 MEETING GROUP OF EXPERTS
FOLLOWING WHICH REPORT TO BE PUBLISHED.

PATTERNS OF ENERGY STUDY WELL IN HAND AND DUE FOR PUBLI-
CATION 1975. STRUCTURAL CHANGES STUDY STILL IN VERY EARLY
STAGE. US SUBMITTED NARRATIVE RESPONSE TO
SECRETARIAT QUESTIONNAIRE ON STRUCTURAL CHANGES

AND PRESENTED COPY 1974 AISI DIRECTORY OF US STEEL
MILLS AND IRON FOUNDRIES.

5. KEY MEETINGS SCHEDULED FOR COMING ACTIVITIES STEEL
COMMITTEE ANNOUNCED AS FOLLOWS:
FEB 18-19, 1975 AD HOC COMMITTEE ON STEEL MARKET REPORT.
MAY 13-14- GROUP OF EXPERTS ON CHANGING PATTERNS OF ENERGY.
JUNE 9-10- WORKING PARTY ON STEEL MARKET REPORT.
JUNE 11-12- AND OCT 27-28- AD HOC COMMITTEE ON LONG
TERM PROSPECTS.
OCT 29-31- PLENARY SESSION ECE STEEL COMMITTEE.
NOV 25-26 GROUP OF EXPERTS OF STRUCTURAL CHANGES.

ALL MEETINGS TO BE HELD GENEVA. DUE TO SIGNIFICANCE PLACED
ON LONG TERM PROSPECTS STUDY BY US STEEL INDUSTRY, STRONG
EFFORTS SHOULD BE MADE TO ENCOURAGE PARTICIPATION BY
US EXPERTS AS MINIMUM AT JUNE AND OCTOBER AND AD HOC COMMITTEE
MEETINGS. ABRAMS

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